Outlook Calendar Guidance

Scheduling Out of Office Time

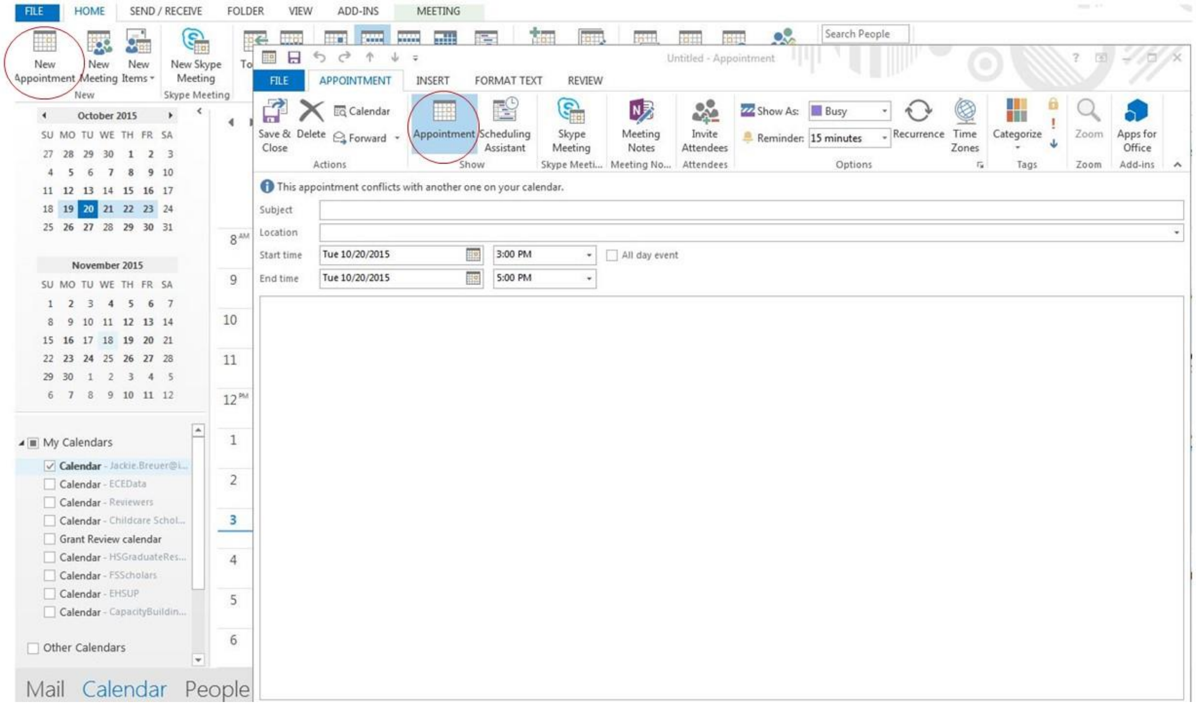
CHILD CARE
State Capacity Building Center

Adding Out of Office to Capacity Building Center Main Calendar

The following guidance was created to provide assistance with using the calendar associated with the CapacityBuildingCenter mailbox as a mechanism for tracking when SCBC staff anticipate being out of the office. All out-of-office time should be tracked in this manner, whether it is for Paid Time Off (PTO), Executive Leave (EL), or for an anticipated onsite TA event, national meeting, etc. Please note that the CapacityBuildingCenter Calendar has replaced the portal calendar as a means for tracking schedules and should be used in addition to your own personal Outlook calendar. Making this information available in a central repository allows for more accurate projection of project expenditures.
The mailbox for the SCBC is accessible from CapacityBuildingCenter@icfi.com or through the Outlook global address book.

Follow the steps below to properly utilize the CapacityBuildingCenter calendar for scheduling any time out of the office:

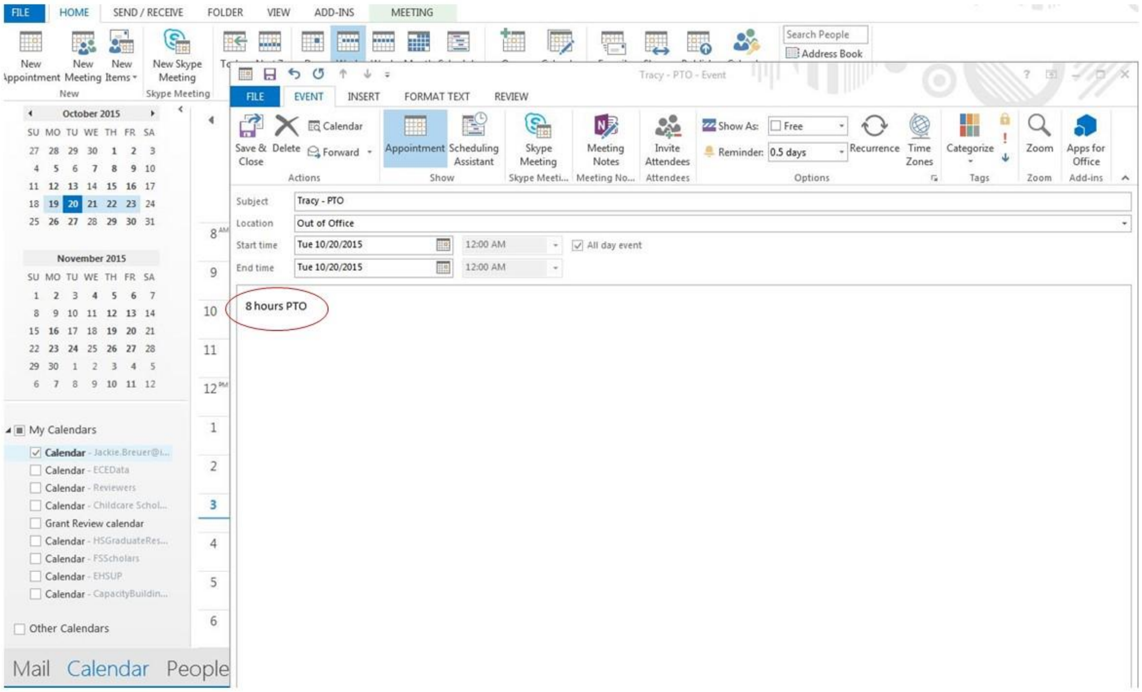
1) Using your personal Outlook calendar, navigate to the **New Meeting** icon located in the calendar section of Outlook. Once you have clicked the icon, enter the time and dates of your anticipated out-of-office event. For consistency, the subject line should include your name and either PTO or a brief description of the off-site event name. (For example – Tracy – PTO or Barbara – Maine TA Onsite Visit.)


FILE
HOME
SEND / RECEIVE
FOLDER
VIEW
ADD-INS
MEETING
New Appointment
New Meeting
New Items
New Skype Meeting
New
Skype Meeting
Search People
October 2015
November 2015
My Calendars
Calendar - Jackie.Breuer@i...
Calendar - ECEData
Calendar - Reviewers
Calendar - Childcare Schol...
Grant Review calendar
Calendar - HSGraduateRes...
Calendar - FSScholars
Calendar - EHSUP
Calendar - CapacityBuildin...
Other Calendars
Mail
Calendar
People
Untitled - Appointment
FILE
APPOINTMENT
INSERT
FORMAT TEXT
REVIEW
Save & Close
Delete
Calendar
Forward
Actions
Appointment
Scheduling Assistant
Show
Skype Meeting
Skype Meeti...
Meeting Notes
Meeting No...
Invite Attendees
Attendees
Recurrence
Time Zones
Options
Categorize
Tags
Zoom
Apps for Office
Add-ins
Subject
Location
Start time
End time
All day event

This appointment conflicts with another one on your calendar.

Show As: Busy
Reminder: 15 minutes
Start time: Tue 10/20/2015 3:00 PM
End time: Tue 10/20/2015 5:00 PM

2) Once you have created the calendar event and populated the fields to indicate the dates and times of your event, fill the body of the calendar event with the total anticipated out-of-office hours for PTO or EL.



Tracy - PTO - Event

Subject: Tracy - PTO

Location: Out of Office

Start time: Tue 10/20/2015 12:00 AM ☑ All day event

End time: Tue 10/20/2015 12:00 AM

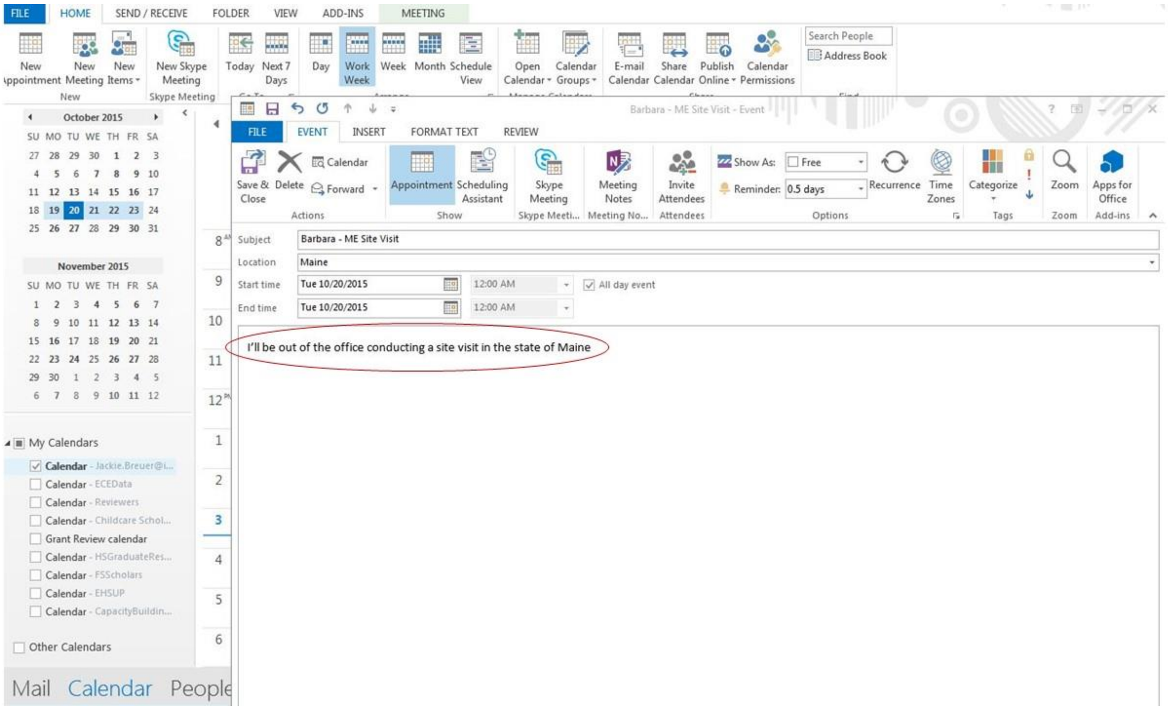
Show As: Free

Reminder: 0.5 days

8 hours PTO

3) Alternatively, if you will be out of office on a work-related matter, simply include a short description of the event name; **do not include the anticipated out-of-office hours.**

Note: Only include number of hours out of office for PTO or EL. Do not fill the body of the email with anticipated out-of-office hours for site visits or other external meetings during which you will be working. Simply indicate that you are out of office at an external meeting or delivering TA to a State or Territory and include details of the event.



Barbara - ME Site Visit - Event

Subject: Barbara - ME Site Visit

Location: Maine

Start time: Tue 10/20/2015 12:00 AM ☑ All day event

End time: Tue 10/20/2015 12:00 AM

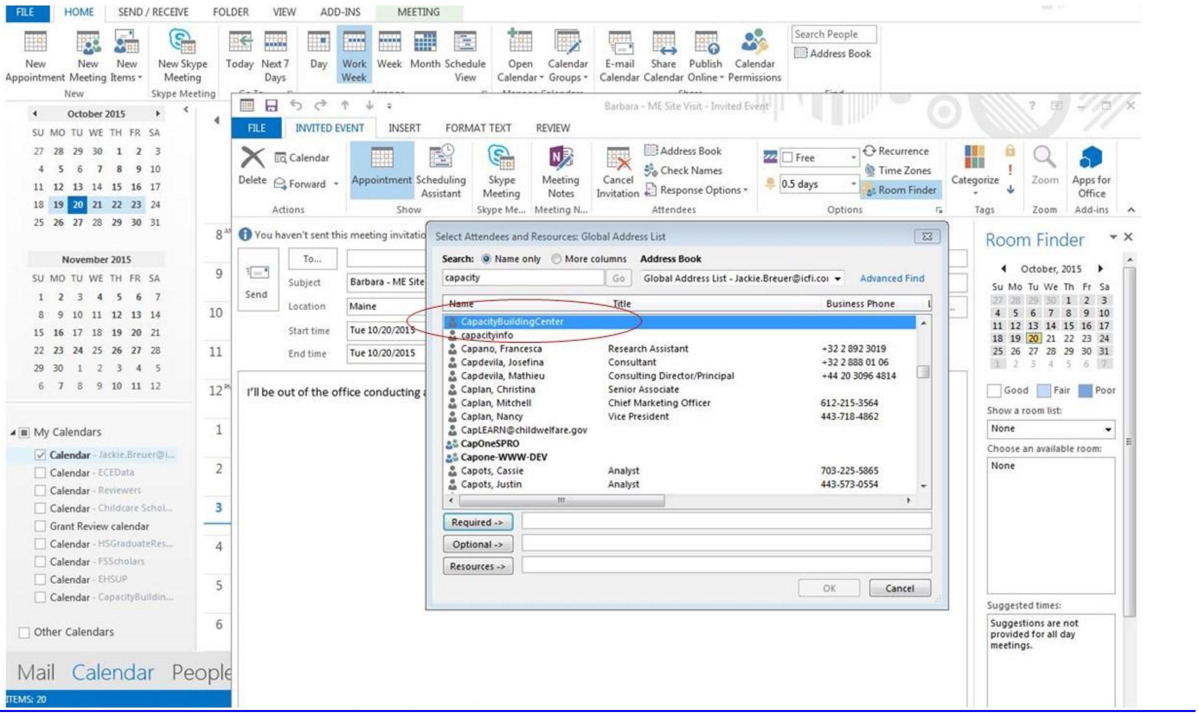
Show As: Free

Reminder: 0.5 days

I'll be out of the office conducting a site visit in the state of Maine

4) Once you have completed filling in the details of your anticipated out-of-office event, you will then click on the **Invite Attendees** button. Here, you will click on the **To** button and then search for CapacityBuildingCenter from the Global Address Book.

Tip:* Please remember that the CapacityBuildingCenter is an email address and is different from the familiar SCBC Distribution List. *Please exercise caution as the two can be easily confused.


FILE
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Delete
Calendar
Forward
Appointment
Scheduling Assistant
Skype Meeting
Meeting Notes
Cancel Invitation
Address Book
Check Names
Response Options
Recurrence
Time Zones
Room Finder
Categorize
Zoom
Apps for Office
Send
To...
Required ->
Optional ->
Resources ->
OK
Cancel
Mail
Calendar
People

You haven't sent this meeting invitatio

Subject: Barbara - ME Site
Location: Maine
Start time: Tue 10/20/2015
End time: Tue 10/20/2015
Free
0.5 days

I'll be out of the office conducting

Select Attendees and Resources: Global Address List
Search: ● Name only ○ More columns
Address Book: Global Address List - Jackie.Breuer@icfi.coı
capacity

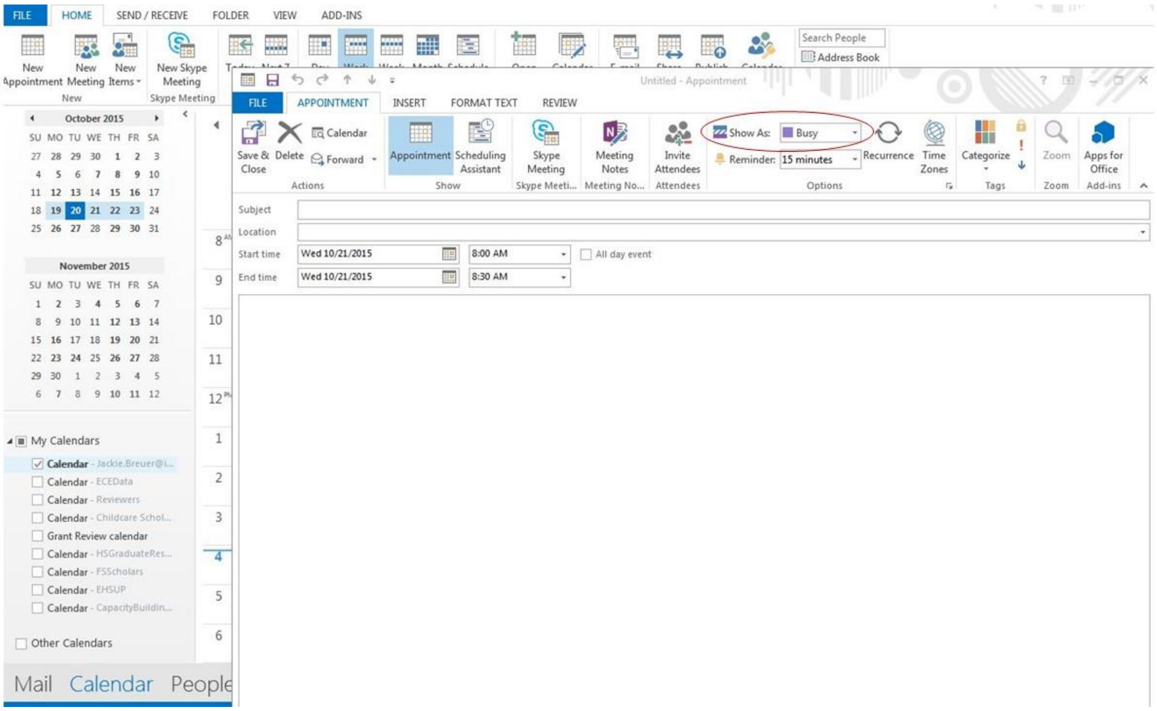
Name	Title	Business Phone
CapacityBuildingCenter		
capacityinfo		
Capano, Francesca	Research Assistant	+32 2 892 3019
Capdevila, Josefina	Consultant	+32 2 888 01 06
Capdevila, Mathieu	Consulting Director/Principal	+44 20 3096 4814
Caplan, Christina	Senior Associate	
Caplan, Mitchell	Chief Marketing Officer	612-215-3564
Caplan, Nancy	Vice President	443-718-4862
CapLEARN@childwelfare.gov		
CapOneSPRO		
Capone-WWW-DEV		
Capots, Cassie	Analyst	703-225-5865
Capots, Justin	Analyst	443-573-0554

5) Once you have the CapacityBuildingCenter address listed in your **To** box and all of the out-of-office details are entered and correct, click **Send**. The Information Services staff will monitor the CapacityBuildingCenter Inbox and will attempt to accept these "invites" within a 24-hour period. Once the invite is accepted, the event will show on both your personal Outlook calendar as well as the CapacityBuildingCenter calendar.

Note: If you need to make modifications to an anticipated out-of-office event, open the item on your Outlook calendar, make the changes, and click on **Send Update**.

Using "Show As" to Provide Additional Information to Calendar Events

Outlook offers the options of selecting how you want items to show up on your calendar. On the drop-down bar in the **Options** section, you can select from the following options:
Free – when others view your calendar, this item will not appear unless you have chosen to share details of your calendar. This can be used for reminders without having the time appear as busy.
Busy – indicates that you are unavailable during this time.
Tentative – appears as a dashed line or grayed out event, indicating that you *may* be available.
Out of Office –indicates that you have something personal or business-related scheduled that will take you away from your office during that time.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New Meeting
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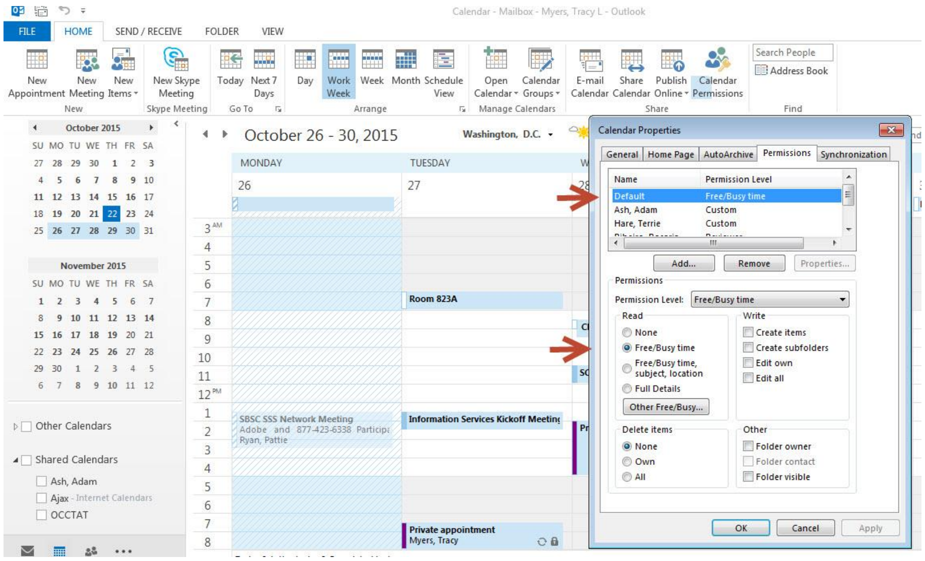
Address Book
Untitled - Appointment
APPOINTMENT
INSERT
FORMAT TEXT
REVIEW
Save & Close
Delete
Calendar
Forward
Appointment
Scheduling Assistant
Skype Meeting
Meeting Notes
Invite Attendees
Recurrence
Time Zones
Categorize
Zoom
Apps for Office
October 2015
November 2015
My Calendars
Calendar
Grant Review calendar
Other Calendars
Mail
Calendar
People

Subject
Location
Start time: Wed 10/21/2015 8:00 AM ☐ All day event
End time: Wed 10/21/2015 8:30 AM
Show As: Busy
Reminder: 15 minutes

6) To assist with efficient scheduling, you should ensure that your calendar permissions are set to reflect your free/busy time. That is, others can see whether you are free or busy, but do not see the details of your schedule—*this should be the default.*

Sharing Your Calendar with Others

To set permissions, go to the Calendar view in Outlook and from the **Home** tab, click on **Calendar Permissions**. Choose **Default** and click on **Free/Busy Time.**


Calendar - Mailbox - Myers, Tracy L - Outlook
FILE
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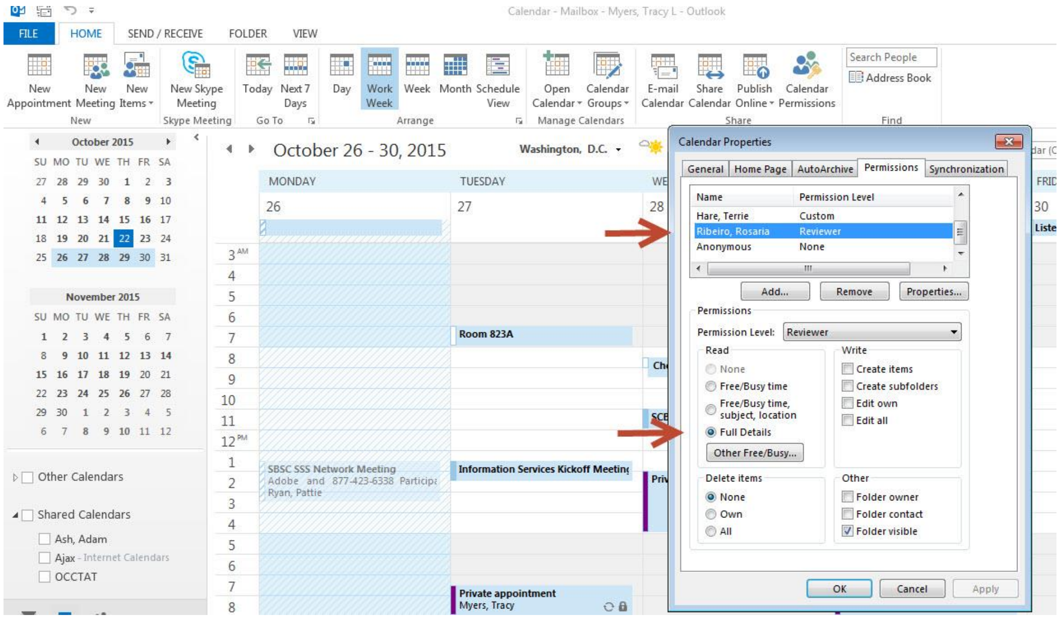
New Appointment
New Meeting
New Items
New Skype Meeting
Today
Next 7 Days
Day
Work Week
Week
Month
Schedule View
Open Calendar
Calendar Groups
E-mail Calendar
Share Calendar
Publish Online
Calendar Permissions
Search People
Address Book
October 26 - 30, 2015
Washington, D.C.
MONDAY
TUESDAY
Room 823A
SBSC SSS Network Meeting
Information Services Kickoff Meeting
Private appointment
Myers, Tracy
Other Calendars
Shared Calendars
Ash, Adam
Ajax
OCCTAT
Calendar Properties
General
Home Page
AutoArchive
Permissions
Synchronization
Add...
Remove
Properties...
Other Free/Busy...
OK
Cancel
Apply

Name	Permission Level
Default	Free/Busy time
Ash, Adam	Custom
Hare, Terrie	Custom

Permissions
Permission Level: Free/Busy time

Read: ○ None ● Free/Busy time ○ Free/Busy time, subject, location ○ Full Details
Write: ☐ Create items ☐ Create subfolders ☐ Edit own ☐ Edit all
Delete items: ● None ○ Own ○ All
Other: ☐ Folder owner ☐ Folder contact ☐ Folder visible

On occasion, there may be individuals with whom you want to share the details of your calendar (e.g., supervisor). To do so, from the **Calendar** view, click on **Calendar Permissions**. Select the **name of the individual** with whom you are sharing, and then click **Full Details**.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Shared Calendars
Ash, Adam
Ajax - Internet Calendars
OCCTAT
Calendar Properties
General
Home Page
AutoArchive
Permissions
Synchronization
Add...
Remove
Properties...
Other Free/Busy...
OK
Cancel
Apply

Name	Permission Level
Hare, Terrie	Custom
Ribeiro, Rosaria	Reviewer
Anonymous	None

Permissions

Permission Level: Reviewer

Read
- ○ None
- ○ Free/Busy time
- ○ Free/Busy time, subject, location
- ● Full Details

Write
- ☐ Create items
- ☐ Create subfolders
- ☐ Edit own
- ☐ Edit all

Delete items
- ● None
- ○ Own
- ○ All

Other
- ☐ Folder owner
- ☐ Folder contact
- ☑ Folder visible

Once you have shared your calendar, you can view yours or others' simultaneously. From the **Calendar** view, click on the additional calendar(s) you would like to view. This is in the **My Calendar** area at the bottom left-hand of the screen. You will then be able to view your calendar alongside another.